

ECF TIPS AND TRICKS
U.S. Bankruptcy Court for the District of Oregon

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Adding Parties

When adding a represented party in ECF, do not enter an address unless the party is the debtor (including in an adversary proceeding as a plaintiff or defendant), an adversary defendant, or a creditor when filing a claim. Per Rule 7005, represented parties other than debtors are served through their attorneys. Adding their address in ECF results in their receiving notices, increasing noticing costs to the judiciary and other parties.

Blank Screen - Bankruptcy/Adversary Headings but No Menu Items

If you can see the Bankruptcy and Adversary headings but there are no categories underneath them, you probably didn't pay a filing fee and got locked out. Go to Utilities-Internet Fees Due and pay, then you should be able to file again. If you still do not see the menu items on the Bankruptcy or Adversary menus, right click, press the <Shift> key, and choose Refresh.

Blank Screen - No Bankruptcy or Adversary Headings

If you can see Query, Reports, and Utilities, but not Bankruptcy or Adversary, you probably logged into PACER, not ECF. Log out and try again using your ECF login and password. If the categories are still missing, try clearing your cache.

Claims - Filing Amended Claim with New Address

In this situation, you may follow one of two procedures:

1. Put the new creditor name and address on the amended proof of claim document, but select the previous creditor's name in ECF and complete the "Amends Claim No. ____" field. The court will change the creditor's name and address in ECF.
2. Note the amended claim number on the proof of claim document and file it in ECF as a new claim. The court will put a remark in the original claim entry referring to the new claim number.

Clearing Browser Cache

Pages you view on the Internet (including ECF screens and documents) are stored in temporary files for quick viewing. If these temporary files are not deleted on a regular basis, they can create problems including the opening of a second window within ECF when a menu option is selected, inability to use the backspace and delete keys, and old versions of updated documents being displayed. You can tell that you are having cache-related problems when one of the aforementioned problems occurs or when an ECF menu category (e.g., Bankruptcy) remains outlined even though you have selected another menu category (e.g., Reports).

Therefore, it is recommended that you regularly clear your Internet browser cache and the temporary storage area on your hard drive. You may want to confer with your information technology resource person about the best way to accomplish this.

To clear your cache in Internet Explorer with ECF open, click the right mouse button on a blank part of the screen, press the <Shift> key, and select Refresh. If the correct ECF menus still don't appear, clear your cache as follows:

Step 1 On the menu bar at the top of the screen, click **Tools** and select **Internet Options**.

Step 2 On the **General** tab, click on **Delete Files**.

[**NOTE:** You are only deleting TEMPORARY FILES of the pages you have viewed using the browser!]

Step 3 Click **OK**.

Computer Problems

If you must file a document but are unable due to technical issues at the court, your office, or your Internet Service Provider, you may file in paper with a “Certification re: Inaccessibility and Request to File” per [General Order #06-2](#).

Credit Counseling Briefing Requirements

The debtor(s) must have received any counseling within 180 days prior to the date and time of the filing of the petition, or you must apply for an exemption or extension of time for credit counseling using LBF #100.3. The debtor is eligible for an extension only if the debtor(s) requested the counseling briefing before the petition was filed, but could not obtain it within 5 days. If you receive a 5-day order because you didn't file either a credit counseling briefing certificate which shows counseling was received in the 180 days prior to the filing of a petition, or a fully completed LBF #100.3, filing only a certificate of credit counseling received post-petition will not avert dismissal!

Emails - Notices from ECF are Not Being Received

If you're not receiving e-mail notices from ECF, it could be due to one of the following:

- Your e-mail address has changed and you have not changed it in ECF, or it was entered incorrectly in ECF. To correct this, go to Utilities-Maintain Your ECF Account, click Email Information, correct the address, click Return to Account Screen, and click Submit.
- Your email account is full. Most Internet Service Providers (ISP's) limit the amount of email you may store on their server. Contact your ISP to determine the limit and delete the emails you no longer need.

- Your Internet Service Provider has a spam blocker. For AOL 9.0, check the Anti-Spam preferences to verify that BKECF_LiveDB@orb.uscourts.gov is listed in the AOL address book. Otherwise, contact your ISP.

To recover your missing email notices, you can click on Reports-Docket Activity, make sure the box labeled “Only cases to which I am linked” is checked, enter the date range for the missing emails, and click Run Report.

Emails - Requesting No Further Notices

ECF participants have complained that they receive email Notices of Electronic Filing (NEF’s) of documents in which they have no interest. In particular, ECF participants receive NEF’s in bankruptcy main cases if they are associated with the adversary proceeding, even if the adversary is closed and they have withdrawn from or were never involved in the main case. This problem has been reported to the Administrative Office of the U.S. Courts.

If your client’s involvement with a case has ended, you may remove your client and yourself from the case by e-filing the text-only event **Miscellaneous-Request for No Further Notices**.

Another option available to you is to learn to manage your NEF’s using the Rule Agent that typically comes with your e-mail software. For example, you can instruct the Rule Agent to route NEF’s with certain subject line keywords to Trash or another folder. For more information, contact your IT support professional or e-mail software provider.

Errors - Taking Corrective Action

If you have made an error in ECF, please call the Help Desk before attempting to correct it. This will ensure that error is fixed in the most efficient way and you are not working at cross purposes with the court.

Events - Finding Correct Event (Menu Item) to File a Document in ECF

It is very important to use the correct event (menu item) in ECF. Not only does it ensure that the item appears on the docket correctly, it often helps the court manage the case by setting or terminating a deadline or case flag, stopping a discharge from automatically being entered, setting a hearing, linking correctly to a response, objection or notice, complying with statistical reporting requirements, etc.

To navigate easily within an ECF picklist, select the first letter of the item and repeat it to scroll through the list. For example, if you are filing a Motion for Relief from Stay, then in the Motions/Applications picklist, press R. The cursor will move to the first “R” motion, Reclassify Claims. If you press R again, it will move to Reconsider and so on until you come to Relief from Stay.

If you cannot readily find the event, go to the event list on the Procedures/Guides/Manual page. [Hint: Clicking the Info button at the top of the Bankruptcy, Adversary, Reports, or Utilities screen will take you to this page.] Follow the instructions at the top of the event list for doing a search by key word, LBF #, etc.

If you are still not sure of the correct event, please call the Help Desk. Do not guess!

Fees - Document Filed in Error

You can avoid fee errors as follows:

- Always verify that you are filing a document in the correct case by looking at the case number and debtor's name displayed on most ECF screens, and opening and viewing your pdf document before pasting it into the ECF field.
- If a fee document is stricken or the court advises you to refile it, use one of the following events: Motions/Applications - Relief from Stay Refiled with No Fee or Miscellaneous - Refile Fee Event with No Fee.

If you have filed a document in error that requires a fee, please do the following:

- Call the Help Desk and report the problem. A financial administrator will contact you to let you know whether the court can issue a refund.
- Please do not pay the fee, refile the document, or file any other fee document until the court has contacted you with further instructions.

Fees - Installments

You may file an installment fee case in ECF using Open a BK Case or Case Upload, and change the amount in the fee field to the amount to be paid with the filing. Be sure to file LBF #110 using Bankruptcy - Motions/Applications - Pay Filing Fee in Installments. Any subsequent installment fee payments must be made outside of ECF via check or money order.

Fees - Locked Out of ECF for Nonpayment

If you didn't pay a filing fee on the day you filed a document or the subsequent day, you may have been "locked out" of ECF. If you are locked out, you can log into ECF, but your Bankruptcy and Adversary menus will be blank. To remove the lockout, simply go to Utilities-Internet Fees Due, pay the fees, and then your filing privileges will be restored. If after payment, your menus do not appear, you may need to clear your cache. If that isn't successful, call the Help Desk.

Fees - Payment Window Disappeared or Is Blank

To close the Internet Fee Payment window, do not click the X in the top right corner; instead, click "Continue Filing". Otherwise, the window will not reappear at the end of the next fee event. If you do click the X, select Utilities-Internet Payments Due and follow the instructions.

Fees - Payment Window Doesn't Appear

Pop-up blockers installed on your computer or browser will prevent the payment screen from displaying. Make sure pop-up windows are enabled for the court's ECF site.

Fees - Reconciliation

ECF has a report that can be used to reconcile credit card charges for filing fees. On the blue menu bar in ECF, click on Utilities/Internet Payment History. Type in the desired date range. The report will list all payments that have been made for filing fees either using the credit card module in ECF or by making a payment at the Clerk's Office. If you want to import this information into a spread sheet or database, use the Internet Payment History Raw Data report. Instructions are available on the screen where you enter in the date range.

Fees - Some Fees are Not Displaying in Payment Window

Do not minimize the Internet Fee Payment window as any further fees will not be added to it. If you want to file more fee documents before paying, click Continue Filing.

Filing on Behalf of Another Attorney

When filing on behalf of another attorney in the firm, it is recommended you sign the document in the format "/s/ Joseph Attorney for Belinda Counsel" where Brenda Counsel is the attorney of record and Joseph Attorney is filing a document on her behalf. When e-filing, Joseph Attorney should not click the button to associate himself to the client(s) as he will then become an attorney of record along with Belinda Counsel.

Financial Management Course - Do Not File Certificate with Petition

Ensure the financial management course was completed after the case was filed per 11 U.S.C. § 727(a) and § 1328 (g).

Forms - Ensuring You Use the Current Version of a Required LBF

The Court announces new LBF's via e-mail to ECF users and inserts the LBF # and last revision date in the title of related events (menu items) in ECF. Such changes are also posted to the main page of the court's website and court bulletin boards, usually 4-6 weeks in advance. Clicking the

LBF button, available on various ECF screens, will take you to the forms page of the court's website where you can find all LBF's in fillable pdf format. You need not wait until the mandatory date to begin using a form; if you begin using it immediately, there is less chance you will forget to use it when mandatory.

Linking to A Related Document in ECF

When linking to a related document, you are prompted to "select the category to which your event relates". If you are unsure of the category, simply click the first item on the list, hold the <Shift> key, and click the last item on the list. This will select all categories and thus bring up all docket entries in the case.

Mailing Matrix Options in ECF

Creditors can register *preferred addresses* with the Bankruptcy Noticing Center (BNC). Some mailing matrices available through ECF display any preferred addresses registered with the BNC and result in PACER charges. Others display only the creditor names as submitted by the debtor and do not involve PACER charges.

Mailing matrices are accessed from Utilities-Mailings:

- ◆ **Creditor Mailing Matrix.** If run in 3 column format, preferred addresses are included. If run in raw data format, the addresses displayed are those submitted by the debtor. This matrix lists creditors, debtors, any debtor's attorney, the trustee, and the U.S. Trustee, but it does not include attorneys for creditors or pro se parties other than debtors who have filed pleadings.
- ◆ **Mailing Labels by Case.** Preferred addresses are included. If the default "All" is selected, all parties and creditors and their attorneys are included. **Use this option to ensure service on all parties and creditors.** It is also possible to narrow the label selection to certain parties, creditor committee members, only creditors who have filed claims, etc.

For those mailing matrices in which preferred addresses are included, the label now includes the original address filed by the debtor along with the preferred address filed with the BNC. In addition, all duplicate and undeliverable addresses are identified clearly on the mailing label sheet in order to reduce unnecessary notices by ECF filers. These features are available only for mailing matrices run in ECF, not PACER.

Orders - Filed in Paper

Submit the following orders in paper to the court, along with any required attachments and a self-addressed stamp envelope:

1. LBF #1307, *Application by Debtor's Attorney for Supplemental Compensation; Order Thereon; and Notice Thereof*
2. LBF #1365, *Debtor's Motion for Allowance and Future Payment on Untimely Filed Claim(s); and Order and Notice Thereon*
3. LBF #1378, *Notice of Motion for Hardship Discharge, and Fixing Times for Filing Objections to the Motion and Complaints to Determine Dischargeability of Certain Debts; and Order and Notice Thereon*

When the judge has signed the order, it will be returned to you for service. After completing the Certificate of Service, file using the appropriate event:

1. Bankruptcy - Motions/Applications - Supplemental Compensation
2. Bankruptcy - Motions/Applications - Allow Untimely Filed Claim
3. Bankruptcy - Motions/Applications - Hardship Discharge

Orders - Default Judgments and Judgments

When submitting a proposed judgment or default judgment, use Upload Order-No Separate Motion and choose Default Judgment, Judgment, or Judgment (Stipulated) as the Order Description. This is necessary for the judge to get the correct order language when signing the order.

Orders - Orders Authorizing Sales or Auctions

When submitting a notice and order of sale or auction (including LBF's #753.50, 753.55, 760, and 760.5), please allow a week for court processing before the notice is issued by the Bankruptcy Noticing Center. Proposed orders which do not allow sufficient time between the date the notice is issued and the proposed sale or auction will be rejected by the court.

Orders - Requirements

When uploading an order, make sure you have met the following requirements:

1. At least 4" of blank space at the top. Pleading paper may be used as long as all numbers and lines of the pleading paper format are within 3/4" of the left margin of the paper.
2. The body of the order is followed by 3 centered pound signs (###).
3. There is no signature line for the judge.

4. Include a list of names and addresses of all parties requiring conventional service, followed by a clearly identified list of the names of all parties requiring service that will be served electronically via ECF.
5. Be sure when using a fillable pdf (e.g., LBF), you save the finished document in Adobe. Do not print to PDF or publish to PDF a document which is already in PDF, as this may create problems when the judge applies the order language (e.g., the text of the order will “scrunch” and be unreadable).

Orders - Stipulated Orders/Judgments

When submitting a stipulated order or judgment, do not file a separate stipulation or motion unless: (1) the motion involves a fee (e.g., compel abandonment of property or withdrawal of reference, which must first be filed as a motion); or (2) you need to stop or delay the imminent entry of a court order (e.g., discharge), in which case file the stipulated order first as a motion using the appropriate event, then upload the same document as an order and link to the motion.

In all other situations, the stipulation/motion language should be included in the body of the stipulated order/judgment or follow the “###” denoting the end of the order. All required signatures must be designated using “/s/ Name”. The order must be uploaded using Upload Order - No Separate Order.

Password - Changing your Password in ECF

- STEP 1** Click on the Utilities heading.
- STEP 2** Click on **Maintain Your ECF Account**.
- STEP 3** Click on **More User Information**.
- STEP 4** Delete the contents of the Password field and enter your new password.
- STEP 5** Click on **Return to Account Screen**.
- STEP 6** Click **Submit**.
- STEP 7** Click **Submit** again.

If you want your login changed, contact the Help Desk and specify the desired login.

PDF - Attachment is Duplicated

If you are trying to attach several different pdf's as attachments, but the end result is that the same pdf is attached multiple times, the problem may be that you are not waiting for each attachment to fully upload before proceeding to the next one. When uploading a pdf, make sure you wait until the Windows flag stops "waving" before you proceed.

PDF - Checking the Dimensions of a Scanned or Converted PDF

Any document which will be served by the court through the Bankruptcy Noticing Center (BNC) must not exceed 8.65 x 11.15 inches, or it will be rejected by the BNC and stricken by the court. It is important to ensure that your PDF conversion software and scanner are producing PDF's which do not exceed 8.5 x 11 inches. When the document is open in Adobe, the dimension appears in the bottom left of the screen. If a scanned document exceeds 8.65" x 11.15", clicking "Save As" in Adobe will resize it.

PDF - Combining PDF's into One Document

Any documents to be filed with a docket entry that total 4,000 KB (4 MB) or less make up a Primary Document which is to be filed as a single PDF. Any required local bankruptcy form(s) must be the first page(s) of the Primary Document. Affidavits, declarations, and certifications [but not Memoranda as they must be separately filed] are also considered part of the Primary Document, and are not considered attachment(s), unless the entire PDF would exceed 4,000 KB (4MB). The certificate of service filed with the document showing service on interested parties must always be the last page of the Primary Document.

If you have Acrobat version 6 or higher, you can combine multiple PDF's, as long as the resulting document does not exceed 4 MB (4000 KB). There are a couple of different ways to do this:

Method 1: Open all PDF documents to be merged. In Adobe Acrobat, click the icon **Create PDF** and select **From Multiple Files**. Check the box **Include all open PDF documents**. The filenames will appear in the box. You may rearrange the order of the files by selecting a file and using the **Move Up** or **Move Down** buttons. Click **OK** and then name the new file and click **Save**.

Method 2: In Adobe Acrobat, open the PDF document which will be at the beginning of the new combined document. Click on **Document-Pages-Insert**. Select the PDF file which you want to append and click **Select**. The **Insert Pages** box displays. In the **Location** field, choose **After**. In the **Page** section, select **Last**. Click **OK**.

PDF - File is Too Large to Upload or Upload is Very Slow

Any document to be filed as part of one event, but that also exceeds 4,000 KB (4 MB), must be broken up for filing into a Primary Document that also has one or more attachments.

Attachments are the smaller PDFs that must be created for any portion of a document which is over 4,000 KB (4 MB). Each attachment must also be no larger than 4,000 KB (4 MB), and there cannot be more than 15 attachments per Primary Document. If there are more than 15 attachments, the document must be filed as multiple documents. The certificate of service filed with the document showing service on interested parties must never be an attachment by itself; it must always be the last page of the pleading portion of the Primary Document.

- To determine the size of your document, while you have the document displayed in Adobe Acrobat, click on **File** and **Document Properties** or press <Ctrl><D>.
- To break a document into smaller segments, simply follow the normal procedure for converting to PDF, making sure that the print range is set to “Pages:” and then entering the page number range (e.g., 1-15, 16-30, etc.). Be sure to give each section of the document a different name (e.g., petition1.pdf, petition2.pdf, etc.) When uploading, make sure each PDF is fully uploaded before attaching the next one.

To keep the size of pdf files as small as possible for faster uploading:

- When converting a word processing document to pdf, use “Print to PDF” (by selecting “Print” or choosing Adobe as the “printer”) rather than “Publish to PDF” or other pdf converters included in your software. These converters are useful for preserving complex formatting features such as hyperlinks, but they create larger files.
- When scanning, choose the scanner setting of black and white (not gray scale or color) and set the resolution to 200 dpi. Never scan a document which you created; instead, convert to PDF using Adobe, which creates much smaller files.

You might also investigate the upload speed of your Internet Service Provider (ISP). ISP’s typically set the speed for download faster than upload. When shopping for an ISP, inquire about upload and download speeds.

Reaffirmation Agreements Not Signed by Debtor’s Attorney

Any reaffirmation agreement that is not signed in Part C by an attorney, including those involving a credit union, should be filed as Reaffirmation Agreement **without** Attorney Certification and will be set for hearing.

Relief from Stay - Filing Combined Motions for Relief from Stay and Relief from Co-Debtor Stay

It is permissible to combine a motion for relief from stay and a motion for relief from co-debtor stay. To electronically file, choose both “Relief from Stay” and “Relief from Co-Debtor Stay” on the motion pick list as follows: Click **Relief from Co-Debtor Stay**, press <Ctrl>, and while holding it down, click **Relief from Stay**.

Service - Determining Who Will Be Electronically Served

To comply with the court's general order, when filing a document other than a Local Bankruptcy Form (LBF), you must list the names and addresses of those who were conventionally served, and separately list those requiring service who will be served electronically via ECF. To determine who falls into which categories, click on Utilities-Mailings...-Mailing Info for a Case.

Service - Determining Who Was Served

To determine who was served with a filed document, you must look two places:

1. To determine who was served electronically via ECF, go to the Docket Report *while logged into ECF (not PACER)* as follows:

Step 1 Click on **Reports** on the ECF Main Menu Bar.

Step 2 Click on **Docket Report**.

Step 3 Enter the case number and click "Include links to Notice of Electronic Filing" if it is not already checked. Click **Next**.

Step 4 Find the document of interest and click on the silver ball to the left of the document number, then click **Display Receipt**.

Step 5 The NEF appears. Scroll to the bottom and find the heading **Notice has been electronically mailed via ECF to:** for a list of parties served via ECF.

2. To determine who was served by the filer or the Bankruptcy Noticing Center (whether by mail, fax, e-mail, or EDI), look at the filed certificate of service. For documents served by parties, it may be part of the original document or a separate docket entry entitled Certificate of Service linked to the original document. A BNC Certificate of Service will be a separate docket entry linked to the order, judgment, notice, etc. and is generally docketed within two business days of the filing of original document. The list of those served follows a copy of the document.

Signatures - Designating Signatures on E-Filed Documents

Per G.O. #03-3, e-filers must retain any documents with signatures other than their own for 10 years. When filing such a document, the e-filer must designate each signature in the format "/s/ Name" in each required place on the document. E-filers may also designate their own signature by affixing a stamp of their scanned handwritten signature.